

Case Study: Worksmart Contracts

Construct for Sage 50 Accounts

Worksmart Contracts are a leading interior fit-out and refurbishment contractor for clients throughout Scotland and the UK. Worksmart deliver successful projects with award winning recognition and a proven track record with high levels of repeat and referred business.

Challenge

Prior to implementing Eque2's Construct for Sage Accounts, Worksmart were using various Excel spreadsheets to manage their job costing and reporting processes. Due to significant growth within the construction industry, Worksmart grew rapidly and increased from 3 to 48 employees, they quickly realised they needed to implement modern, industry-specific software to support this.

The main challenges Worksmart faced were around the inaccuracy of the data they held. With no audit trail and limited access rights, transactions were getting deleted and lost, making it impossible for them to report effectively on the performance of their jobs. This led to inaccurate reports for their quarterly accounts.

They also faced challenges around managing their subcontractors effectively from tracking retentions to monitoring compliance. Lisa Neilson, Finance Director at Worksmart said "It's extremely important that we track subcontractor insurance details effectively, if a subcontractor doesn't have insurance or their insurance has expired we can't work with them. Trying to manage this on spreadsheets is extremely challenging as we can't track this information effectively or put orders on stop if their insurance has lapsed".

Solution

Worksmart went out to market and looked at 4 vendors to implement a job costing solution which would replace their current Excel spreadsheets. They decided to move forward with Eque2, opting for Construct for Sage Accounts with ICA Reporting (Intelligent Construction Analysis), Construct Mobile Delivery Notes and Invoice Capture.

Lisa Neilson said "We were impressed with Eque2, we received detailed demonstrations which put our faith in Eque2 early on as the software offered us what we were looking for and more. As current users of Sage Accounts it was great that we didn't have to change our accounts solution and the software integrated fully with Sage. The implementation process was also impressive, we booked in implementation days with our staff to ensure everyone could use the software confidently".



Based in Scotland, Worksmart are a leading solutions based Refurbishment & Interior Fit-Out contractor who deliver projects across five main market sectors: Office, Technology, Science & Health, Retail & Finance, Hotel & Leisure and Education & Public Sector.

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Lisa Neilson
Finance Director at Worksmart

Since the implementation of the software Worksmart have already transformed the way they work as a business, Lisa commented, "With Eque2 we have a new way of working and it has allowed us to streamline our day to day processing with more accuracy. We can limit access rights to users so the team can only access the areas that are relevant to them, removing the risk of transactions getting deleted or amended."

Lisa continued, "Construct has also ensured our cash flow is more visible and secure, we are able to keep a tight control over our budgets across all areas of our business. We are also able to track subcontractor retentions efficiently as the software calculates it all for us as the click of a button. Our buyer has greater visibility when purchasing materials, they know if we are going over budget based on what has been tendered for as the software automatically alerts us, which we couldn't track previously. We can also manage our subcontractor liabilities effectively for each job, knowing what has been invoiced for that month and what is left over for cash flow".

Advanced detailed reporting has allowed Worksmart to analyse their jobs in greater detail, they are able to track the spend on a job accurately and track how much money they have made from their jobs.

Lisa added "The reporting module within Construct is fantastic, our Commercial Director can now see what we have spent on a particular job and what money we are making. Our quarterly accounts are accurate and the reporting has given us greater insight and analysis around this, so we can spot key trends early on. We are also able to track our subcontractors effectively and pull out key information around the status of their insurance.

Worksmart also implemented Eque2's Construct Mobile Delivery Notes app which allows them to achieve a three-way match between purchase orders raised, the goods that turn up on-site and the invoices you are asked to pay.

Lisa mentioned, "The Mobile Delivery Notes app has been great, our site supervisors have the app installed on their tablets and phones so they can record deliveries made to site and report them straight into Construct in real-time, it's all instant and leaves no room for error."

"We also opted for Eque2's Invoice Capture module which allows us to scan documents with unique barcodes

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Finance Director at Worksmart

which are then automatically attached to transactions in Construct meaning more invoicing can be done in a shorter period."

Purchasing these solutions has saved Worksmart a significant amount of time and ensures they work together effectively as a team. They can now get more users in the system working whereas previously with spreadsheets only two people could access documents at one time.

Lisa finished by saying, "We are extremely happy with the Eque2 solutions we have implemented, it has transformed our business allowing us to work more effectively whilst ensuring everyone is doing everything the right way. The ongoing support from Eque2 is fantastic, if we do need to contact the helpdesk we can get through straight away and our queries are always answered and resolved. We are looking forward to continuing our relationship with Eque2 and learning more about what the software can offer our business."

Find out more

For more information about Worksmart visit <https://worksmartcontracts.co.uk/>. To discuss the features and benefits of Eque2's Construct for Sage accounting software, please contact a member of our team.

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